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FOREIGN CROPS and MARKETS

UNITED STATES DEPARTMENT OF AGRICULTURE
OFFICE OF FOREIGN AGRICULTURAL RELATIONS
WASHINGTON, D. C.

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LATE CABLES

India final official estimate of 1941 wheat crop placed at 373,520,000 bushels from 34,862,000 acres, indicating a 3-percent increase in acreage over that of 1940 and a 7-percent decrease in production.

Canadian wheat stocks on July 31 totaled 480 million bushels as against 300 million last year. Stocks of other grains as follows: Oats 41,713,000 bushels, barley 10,675,000, rye 4,912,000, flaxseed 620,000.

British-Egyptian cotton agreement, concluded on August 10, 1941, subject to approval of Egyptian parliament proposes joint financing of the purchase of the 1941-42 Egyptian crop by the two governments. The price schedule apparently will be the same as last year's, and planters are guaranteed 50 percent of possible British profits on resales and all profits that may be realized on the Egyptian portion. Restriction of the 1942-43 acreage is contemplated in the agreement. The Egyptian Government plans to float a loan either internally or abroad, of £ 15,000,000 Egyptian ($61,884,000) to finance its half of the scheme. Commercial exports are to be permitted.

Declared exports of Spanish pickled olives to the United States from the Seville consular district for the month of June 1941 were as follows with 1940 comparisons in parentheses: In brine, 150,452 gallons (816,604); pitted and stuffed, 313,600 gallons (388,664). These were composed of 249,012 gallons of Queens (973,972) and 215,040 gallons of Manzanillas (231,296).

The July declared exports of Brazil nuts to the United States from Belem and Manaos, Brazil, were as follows, with 1940 comparisons in parentheses: 973 short tons shelled (850) and 929 tons unshelled (1,850). Demand from the United States considered firm. Spot price for medium-sized nuts at Belem, 105 milreis per hectoliter (about 5.67 cents per pound). Spot price at Manaos for large washed, 130 milreis per hectoliter (about 7.03 cents per pound).

British Ministry of Food announces that weekly cheese ration will be increased from 2 to 3 ounces per person for ordinary consumers from August 25. Ration of 8 ounces for priority classes will remain unchanged.

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G R A I N S

CANADIAN GRAIN CROPS AFFECTED BY HEAT AND DRY WEATHER . . .

High temperatures and inadequate rainfall were the principal factors affecting the 1941 grain crops of Canada during July, according to the Dominion Bureau of Statistics at Ottawa. Largely because of declines in Saskatchewan and Alberta, the condition of spring wheat was reduced to 72 percent of the long-time average yield per acre as compared with 80 on June 30, 1941, and 105 on July 31, 1940. Prospects in Manitoba continued to be excellent at 125 percent, which was 2 points higher than a month earlier but 1 point below the condition reported on July 31, 1940. With the exception of corn for husking, all feed grains declined during July and all grain crops, fodder, and pasture were considered below average.

CANADA: Condition of grain crops, expressed in percentages of the long-time average yield per acre, July 31, 1941, with comparisons

Crop	1940			1941		
	May 31	June 30	July 31	May 31	June 30	July 31
	Percent	Percent	Percent	Percent	Percent	Percent
Spring Wheat	92	96	105	98	80	72
Spring Rye	93	92	85	95	86	63
Oats	92	92	88	94	87	72
Barley	91	92	84	93	89	73
Mixed grain	92	96	97	94	84	84
Corn for husking..	-	83	83	-	89	96

Dominion Bureau of Statistics, Ottawa.

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CANADIAN WINTER-WHEAT PRODUCTION REDUCED; WINTER-RYE INCREASED . . .

The 1941 crop of winter wheat in Canada was estimated at 16,417,000 bushels, according to the Dominion Bureau of Statistics, as compared with 22,099,000 bushels harvested in 1940 and an average of 17,171,000 bushels during 1935-1939. While most of the reduction, this year from last, was also somewhat under that of last year. Ontario is the only Canadian Province that grows winter wheat, the outturn representing about 5 percent of the total crop of the Dominion during 1935-1939.

The production of winter rye was increased by approximately 300,000 bushels this season to 10,644,000 bushels, or nearly 50 percent above the average crop of 1935-1939. The acreage seeded was increased by 2 percent over that of last season and was 165,000 acres above the average of the preceding 5 years. Average yields were only slightly better this year than last.

CANADA: Acreage and production of winter wheat and winter rye, average 1935-1939, annual 1940-1941

Year	Winter Wheat		Winter Rye	
	Acreage	Production	Acreage	Production
	1,000 acres	1,000 bushels	1,000 acres	1,000 bushels
1935	555	12,601	574	7,795
1936	509	12,478	458	3,042
1937	719	18,689	700	4,579
1938	742	19,814	554	8,363
1939	735	22,271	891	12,178
Average	652	17,171	635	7,191
1940	775	22,099	786	10,357
1941	629	16,417	800	10,644

Dominion Bureau of Statistics, Ottawa

AUSTRALIA'S WHEAT HARVEST SMALLEST IN 20 YEARS . . .

Australia's wheat production in 1940-41 was the smallest reported since 1919-20, according to the latest figures available. The estimated harvest of 83,192,000 bushels from 12,386,000 acres sown indicates an average yield per acre of only 6.7 bushels, the lowest recorded since 1914-15. In 1939-40 the area seeded to wheat was placed at 13,284,000 acres, from which 210,277,000 bushels were obtained, or an average yield per acre of 15.8 bushels. The virtual failure of last season's crop resulted from drought conditions, which prevailed practically throughout the season, particularly in important areas of New South Wales and South Australia.

Prospects for the 1941-42 wheat crop have been somewhat more favorable than in the previous season. The weather during April and May was rather dry throughout the agricultural areas of the Commonwealth, but average rainfall was received in some sections during the latter month, and widespread precipitation was reported during the first half of June. Sufficient surface moisture was available to complete seeding in most areas, although it was stated by the trade that satisfactory crop returns would not be obtained unless good rains were received in July. Recent information indicates that conditions were fairly satisfactory in the western part of the country early in August but in parts of New South Wales and Victoria, moisture supplies were still deficient.

AUSTRALIA: Acreage and production of wheat, by States, average 1934-35 to 1938-39, annual 1939-40 and 1940-41

State	Average 1934-35 to 1938-39		1939-40		1940-41 a/	
	Acreage	Production	Acreage	Production	Acreage	Production
	1,000 acres	1,000 bushels	1,000 acres	1,000 bushels	1,000 acres	1,000 bushels
New South Wales ..	4,169	53,634	4,381	76,552	4,289	24,441
Victoria	2,522	34,505	2,827	45,054	2,673	13,522
Queensland	512	4,223	361	6,585	302	5,600
South Australia ..	3,095	32,578	2,735	41,072	2,559	17,822
Western Australia	2,864	28,984	2,970	40,861	2,552	21,600
Tasmania	16	359	8	108	9	187
A. C. Territory ..	2	42	2	45	2	20
Total	12,980	154,325	13,284	210,277	12,386	83,192

Compiled from official statistics.
a/ Preliminary.

The Commonwealth Government has had considerable trouble, it appears, in limiting wheat seedings this season. Under the Wheat Stabilization Scheme, the wheat acreage of each grower was to be no larger than the average cultivated during 1938-39 to 1940-41. It was hoped in this way to keep production from exceeding 160 million bushels, for 140 million bushels of which the Government guaranteed a price of 3s. 10d. per bushel (about 56 cents per bushel), f.o.b. ports, bagged. The remaining 20 million bushels represent the amount usually kept on farms for seed and feed purposes. When applications for licenses to grow wheat began to come in, it was found that the farmers were claiming larger acreages than had been officially estimated. The Wheat Industry Stabilization Board therefore set up local committees in all wheat-growing districts to prevent applications for registration of ineligible acreages and to keep the farmers from exaggerating their previous wheat areas in applying for licenses to seed wheat for the 1941-42 crop. These committees were to be made up of wheat growers nominated by the Wheat-Growers' Associations and a representative of a State Government Department. The committees were instructed that no legitimate grower was to be penalized and that no person, not a legitimate wheat producer should be allowed to grow wheat.

While Australia is the least burdened by surplus supplies this season of the four principal surplus-producing countries of the world, prospects for future exportation appear more unfavorable at present than at any time since the European war began because of the situation in the Orient, where Australia has been able to dispose of considerable wheat and wheat flour this season. Official trade data are not released, but it is unofficially estimated that Australia had an exportable surplus

on July 1 of about 60 million bushels, a considerable part of which will no doubt be carried over into the new season beginning December 1. With a view toward increasing domestic consumption, the Power Alcohol Committee has been recently considering the possibility of expanding the production of power alcohol in Australia and has recommended that wheat should be used for this purpose. It was suggested that the production of 38 million gallons should be distributed among the States, but no estimate was received of the quantity of wheat required for such production.

ARGENTINE BARLEY EXPORTS MUST BE FROM GRAIN BOARD STOCKS . . . .

The Argentine Government, in a decree of July 22, 1941, restricted exports of 1940-41 barley to supplies in the hands of the Grain Board, according to information received in the Office of Foreign Agricultural Relations. Exceptions were made for those lots which exporters could prove were ready for shipment when the decree became effective. All barley transactions in the Grain Futures Market were ordered to be liquidated at the closing price on July 22, and further dealings in this market with barley of the 1940-41 crop were prohibited.

It was pointed out that minimum prices for barley were established to support producers (see Foreign Crops and Markets, December 23, 1940) during a grave international situation. Furthermore, it was necessary to provide for the marketing of the stocks purchased by the Board as advantageously as possible in order to prevent undue losses and to keep speculators from profiting from the difficulties encountered in disposing of the purchased crop.

CROATIAN ECONOMY TO BE ORGANIZED . . .

Measures are being prepared by the Government of Croatia (part of former Yugoslavia) for the purpose of regulating the economy of the country and assuring an adequate supply of food, according to information received by the Office of Foreign Agricultural Relations. It was said that the entire 1941 harvest would be purchased by the Government and all private trade in agricultural production eliminated. The formation of an Office for Foreign Orders was contemplated, which would approve all shipments to foreign countries, and preparations were under way to organize all Croatian industry on a syndicate basis. The principal crops grown in Croatia are wheat, corn, other grains, and sugar beets.

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CHILE HARVESTS SMALLER RICE CROP . . .

The 1940-41 rice crop of Chile was officially estimated at 1,920,000 bushels as compared with 2,595,000 bushels for the previous year, according to a report received from Santiago. This is the first reverse in the sharp upward trend in Chilean production that began about 8 years ago.

Rice imports into Chile have declined rapidly during the past 2 years. During recent years imports have been obtained primarily from other South American countries and the Orient. Imports from the United States during the past 2 years have been insignificant, while from 1926 to 1935 the amount averaged over 10 million pounds annually. The Chilean Agricultural Export Board reported that for the first 7 months of 1941 it had not authorized the exportation of any rice, and that there had been no imports.

CHILE: Rice production and imports, averages, 1926 to 1935, annual 1936 to 1941

Year	Production a/		Imports
	Paddy	Milled equivalent	
	1,000 bushels	1,000 pounds	1,000 pounds
Average			
1926-1930	-	-	46,005
1931-1935	-	-	28,983
Annual			
1936	269	7,485	35,562
1937	637	17,691	38,556
1938	1,372	38,104	27,148
1939	1,620	45,015	18,655
1940	2,595	72,081	879
1941	1,920	53,346	-

Compiled from official sources.
a/ Production for the 1935-36 year is given in 1936.

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CUBA CONTINUES HEAVY IMPORTS OF AMERICAN RICE . . .

Unofficial statistics received from Habana indicate that during June Cuba imported approximately 31 million pounds of United States rice as compared with 28 million during the same month a year ago. Imports from the Orient continued at a very low level, and arrivals from other Latin American countries were insignificant. Total imports for the first 6 months of 1941 include over 215 million pounds of United States rice, representing approximately 93 percent of total arrivals. During the same

period, imports from oriental countries amounted to only 15 million pounds, or less than 6 percent of the total. The reduced imports from the Orient this season are attributed to several factors, the most important of which are higher freight rates, lack of shipping space, and heavy purchases by Japan from the surplus oriental countries.

CUBA: Rice imports, June 1941 with comparisons

Country of origin	June		January-June		January-December	
	1940 a/	1941 a/	1940 a/	1941 a/	1939	1940 a/
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
United States	28,366	30,769	144,924	215,357	222,660	255,449
Orient	224	549	85,358	15,217	220,800	172,073
Egypt	-	-	728	-	601	650
Ecuador	-	-	-	1,000	-	-
Dominican Republic	-	175	-	915	-	-
Others	-	-	-	-	76	1,028
Total	28,590	31,493	231,010	232,489	444,137	429,200

American Consulate, Habana. a/ Preliminary

GRAIN STATISTICS . . .

WHEAT, INCLUDING FLOUR: Shipments from principal exporting countries, as given by current trade sources, 1938-39 to 1940-41

Country	Total shipments		Shipments 1941 week ended			Shipments July 1-Aug. 9	
	1938-39	1939-40	July 26	Aug. 2	Aug. 9	1940-41	1941-42
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
North America a/	245,296	209,872	4,543	4,746	4,225	19,769	32,083
Argentina	114,272	173,776	1,550	2,238	2,218	18,123	11,801
Australia	102,116	b/	-	-	-	-	-
Soviet Union	39,824	-	-	-	-	-	-
Danube & Bulgaria c/	52,848	39,616	-	-	-	-	-
British India a/	d/10,097	-	-	-	-	-	-
Total above	564,453	-	-	-	-	e/37,892	e/43,884
Total European a/	450,784	-	-	-	-	-	-
Total ex-European a/	146,760	-	-	-	-	-	-

Compiled from official and trade sources.
a/ Broomhall's Corn Trade News.
b/ Not available.
c/ Black Sea shipments only; no figures for current weeks.
d/ Official.
e/ North America and Argentina only.

GRAINS: Weekly average closing price per bushel, future delivery, at leading markets, 1940-1941

Week ended	Wheat						Corn			
	Chicago		Winnipeg a/		Buenos Aires		Chicago		Buenos Aires	
	1940	1941	1940	1941	1940	1941	1940	1941	1940a/	1941b/
	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
High c/	77	112	67	71	d/ 75	57	61	78	35	26
Low c/	74	104	67	68	d/ 70	55	58	75	33	26
	September									
July 12	75	107	67	71	e/ 74	56	58	76	35	26
19	74	104	67	71	e/ 75	55	59	75	35	26
26	74	105	67	70	e/ 74	55	61	75	34	26
Aug. 2	76	107	67	68	e/ 70	55	61	76	33	26
9	74	112	67	68	70	55	61	78	33	26

Corn prices at Buenos Aires compiled from New York Journal of Commerce; all other prices from Chicago Daily Trade Bulletin. a/ October futures. b/ Official price. c/ July 5 to August 9, 1941, and corresponding dates for 1940. d/ August and September futures. e/ August futures.

FEED GRAINS: Movement from principal exporting countries, August 9, 1941

Commodity and country	Yearly exports		Shipments week ended a/			Exports so far reported		
	1938-39	1939-40	July 26	Aug. 2	Aug. 9	July 1 to	1939-40 b/	1940-41 b/
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels		1,000 bushels	1,000 bushels
BARLEY, EXPORTS: c/								
United States	11,215	3,532	-	-	-	May 31:	3,496	601
Canada	16,537	13,338	-	-	-	June 30:	13,338	1,574
Argentina	9,356	18,628	-	-	-	June 30:	18,628	4,588
Danube & U.S.S.R.	26,005	4,272	-	-	-	June 30:	4,272	1,000
Total	63,113	39,770	-	-	-		39,734	7,763
OATS, EXPORTS: c/								
United States	5,106	1,429	-	-	-	May 31:	1,318	1,159
Canada	13,738	24,330	-	-	-	June 30:	24,330	15,690
Argentina	19,379	27,624	-	-	-	June 30:	27,624	4,070
Danube & U.S.S.R.	30	250	-	-	-	June 30:	250	0
Total	38,253	53,633	-	-	-		53,522	20,919
CORN, EXPORTS: d/						Oct. 1 to		
United States	34,369	44,284	-	-	-	May 31:	27,714	9,141
Danube & U.S.S.R.	19,629	5,304	-	-	-	Aug. 9:	4,832	0
Argentina	142,869	87,177	0	4	0	Aug. 9:	81,163	20,055
South Africa	25,991	15,499	-	-	-	Aug. 9:	14,745	0
Total	222,858	152,264					128,454	29,196
CORN, IMPORTS: d/								
United States	442	1,110				May 31:	399	1,051

Compiled from official and trade sources. a/ The weeks shown in these columns are nearest to the date shown. b/ Preliminary. c/ Year beginning July 1. d/ Year beginning October 1.

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VEGETABLE OILS AND OILSEEDS

JAPANESE RAPESEED CROP DISAPPOINTING . . .

The Japanese Government places the 1941 rapeseed production at 228 million pounds. This is a preliminary estimate based on reports from 89 percent of the cultivated area and represents the smallest yield since 1933, according to information received in the Office of Foreign Agricultural Relations. The decline is attributed to unfavorable weather, an insufficient supply of fertilizer, and shortage of farm labor. The small margin of profit received by the producer is also believed to be an important factor.

Rapeseed oil was used chiefly for edible purposes until recently, when it was diverted to industrial uses because of the limited supply of other vegetable oils.

JAPAN: Rapeseed production 1933-1941, foreign trade 1934-1939, and January-September, 1939 and 1940

Year	Production	Year	Imports of rapeseed	Exports of rapeseed oil
	1,000 pounds		1,000 pounds	1,000 pounds
1933	193,875	1934	102,754	34,928
1934	238,236	1935	144,593	64,341
1935	267,609	1936	39,554	53,032
1936	267,106	1937	3,324	16,354
1937	291,703	1938	1,121	11,801
1938	256,764	1939	59	24,168
1939	265,424	Jan.-Sept.		
1940	239,833	1939	-	12,954
1941 a/	227,515	1940	18,680	4,078

Compiled from official sources.
a/ Preliminary.

Foreign Trade statistics have not been published by the Government since September 1940. At that time shipments of all vegetable oils were far below normal, in spite of Japan's efforts to increase export trade and thus obtain foreign exchange to finance imports of war materials. Exports of vegetable oil to the United States in 1936 amounted to 153 million pounds and averaged around 95 million from 1935 to 1939, accounting for 79 percent of the total exported during that period.

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T O B A C C O

CHILE HAS RECORD TOBACCO CROP IN 1940 1/ . . .

More than 21.0 million pounds of tobacco were harvested in Chile in 1940. This crop was the largest on record and exceeded the average 1935-1939 harvest by approximately 38 percent. The harvested area was 12,497 acres, also the largest on record, but the yield per acre was not quite up to normal. There has been a steady increase in the Chilean tobacco crop since about 1934, to meet an equally steady rise in consumption. With the exception of small quantities imported for blending purposes, the Chilean industry is self-sufficing. Exports are unimportant.

CHILE: Area, production, and yield of tobacco, 1930-1940

Year of harvest	Area	Production	Yield per acre
	Acres	Pounds	Pounds
1930	9,538	16,701,267	1,750
1931	11,273	18,913,927	1,677
1932	4,623	8,403,113	1,817
1933	5,308	8,745,664	1,648
1934	4,423	7,627,523	1,725
1935	7,635	14,246,416	1,866
1936	8,270	14,902,203	1,802
1937	8,681	15,253,407	1,757
1938	7,816	14,882,595	1,904
1939	8,708	16,967,479	1,949
1940	12,497	21,087,486	1,687

Agricultura Anuario; Estadistica Chilena.

High mountains border the eastern side of Chile, and a cold ocean current washes the west coast. Thus, climatic conditions are not generally favorable to the production of tobacco, especially to the production of finer qualities. The types are dark, principally cigar varieties, the seeds of which originated in Paraguay and Cuba. Production of the Paraguay type amounted to about 17.1 million pounds in 1940, or about 81.3 percent of the total crop. Practically all of the remainder, amounting to approximately 3.9 million pounds, was from Havana seed. A little attention has been given to the development of lighter types from Virginia and Turkish seed, but efforts along this line seem to be decreasing.

Aconcagua is the principal tobacco-producing Province of Chile, though the crop is grown in fairly important quantities in Talca, Santiago, and O'Higgins. Nearly half of the 1940 crop was grown in Aconcagua, and more than half of the 442 growers were in that Province.

1/ Prepared by Louise Moore Coleman, Assistant Agricultural Economist.

CHILE: Production of Tobacco by types, 1935-1940

Type	1935	1936	1937	1938	1939	1940
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Paraguay	9,980	10,460	10,466	10,331	11,725	17,141
Havana	4,012	4,216	4,249	4,395	5,100	3,943
Virginia-seed	212	226	529	156	103	3
Turkish	42	-	10	-	39	-
Total	14,246	14,902	15,254	14,883	16,967	21,087

Estadistica Chilena.

The domestic leaf supply has been supplemented during the past 3 years by approximately one-fourth of a million pounds imported principally from Cuba, the United States, and the Netherlands Indies. This is a decided increase over the leaf imports of previous years and coincides, in part at least, with an increase in the output of cigarettes, the general trend of which has been upward since 1933.

CHILE: Imports of leaf tobacco, by principal countries, 1935-1940

Country	1935	1936	1937	1938	1939	1940
	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds
Cuba	45,325	117,483	62,135	223,099	266,430	208,996
Netherlands	10,337	11,715	14,848	15,428	1,896	15,701
United States ...	11,576	20,615	5,304	13,278	21,539	21,415
Brazil	-	-	2	2	622	2,716
United Kingdom ..	6,964	254	302	3,955	300	1,195
Others	534	1,495	910	1,314	2,416	1,114
Total	74,736	151,562	83,501	257,076	293,203	251,137

Estadistica Chilena.

No figures are available as to the actual consumption of tobacco in Chile, but as tobacco imports are small and exports almost nil, the output of products is a substantial index to the quantity consumed. As in many other countries, cigarettes are by far the most important product. Cigarette production in 1940 (based on a weight of 3 pounds to the thousand) was equal to over 90 percent of the total output of tobacco products, and amounted to about 12.5 million pounds.

Chilean cigarettes are now put up in packages of 10. The most popular brands retail for 40 centavos (2.0 cents) per package; 30 centavos (1.6 cents); and 60 centavos (3.1 cents). American brands are much higher and sell at retail for from 7 to 14 pesos (36.2 to 72.3 cents) per package of 20 depending upon the method of sale.

CHILE: Approximate consumption of tobacco as indicated by the output of products, 1935-1940

Calendar year	Cigars	Cigarettes	Pipe tobacco
	Thousands	Thousands	Packages a/
1935	6,935	3,643,258	7,538,994
1936	7,525	3,875,825	6,791,383
1937	8,260	4,195,615	7,136,610
1938	5,035	4,239,966	5,780,376
1939	5,610	3,863,638	6,427,744
1940	4,996	4,172,743	8,551,497

Estadistica Chilena, December 1940.
a/ Average weight about 1-3/4 ounces.

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NETHERLANDS INDIES LIMITS THE USE OF IMPORTED TOBACCO . . .

Regulations of the Netherlands Indies Government provide that manufacturers of cigarettes in that country shall use a fixed percentage of native tobacco in relation to imported tobacco, according to information available in the Office of Foreign Agricultural Relations. The ratio for the second quarter of 1941 was 64 percent native leaf to 36 percent imported leaf; and for the third quarter, 68 percent native to 32 percent imported. As the percentage regulations apply to the total consumption only, the manufacturer has a free hand in the method of using his quota. Thus, all cigarettes do not necessarily have to contain the specified percentage of native and imported leaf, but the total leaf consumed by the manufacturer during the quarter must conform to the fixed relation.

The purpose of the regulations is to decrease the imports of foreign leaf tobacco, but it is anticipated that the import trade may really increase as one large company has obtained special permission to manufacture cigarettes for export that contain only a 50-50 ratio of native and imported leaf.

Consumption of cigarettes in the Netherlands Indies (as indicated by the retail sales) showed a slight increase during the first 4 months of 1941 as compared with a similar period of 1940. Consumption of strootjes (cheap native cigarettes wrapped in corn husks or tree leaves) declined for several reasons: (1) The tax was increased by 50 percent; (2) the price of machine made cigarettes is decreasing, and (3) there is a growing desire among the new generation of natives to emulate the smoking customs of Europeans.

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FRUITS, VEGETABLES, AND NUTS

WAR REDUCES JAMAICAN CITRUS EXPORTS . . .

A sharp decline in exports of citrus from Jamaica during the past season resulted from the European war, according to a report from American Vice-Consul George F. Kelly at Kingston. Exports of sweet oranges amounted to 171,418 boxes during the first 10 months of the 1940-41 season (September-June), a decline of about 100,000 boxes below the average for the previous 5 years. Shipments of fresh grapefruit, which amounted to 21,259 boxes, were only about one-sixth of the average export volume for the previous 5 years.

JAMAICA: Exports of citrus and citrus products by principal countries, September - June, 1940-41

Kind of Fruit	United Kingdom	Canada	Bahamas	Bermuda	Total
	Boxes	Boxes	Boxes	Boxes	Boxes
Fresh citrus a/					
Sweet oranges	157,500	6,230	15	7,673	171,418
Bitter oranges	74,237	10,335	0	0	84,572
Grapefruit	3,649	15,778	10	1,822	21,259
	American	American	American	American	American
Citrus products b/	gallons	gallons	gallons	gallons	gallons
Orange juice	120,371	36,033	0	0	156,404
Grapefruit juice ...	252,315	14,322	0	2,518	269,155

Compiled from consular reports.
a/ Statistics for July and August not yet available. b/ June-May year.

The British Ministry of Food purchased the entire Jamaican orange crop and the Jamaican Government Marketing Department was set up as the agent for the Ministry and was declared to be the sole exporter of citrus fruit. Few export shipments were made to outlets other than the Food Ministry. The bulk of sweet-orange exports moved to the United Kingdom, with a few thousand boxes going to both Canada and Bermuda. Bitter-orange exports also went chiefly to the United Kingdom. A shortage of bitter oranges existed in Great Britain because of the reduced imports from Spain in the 1940-41 season. Bitter oranges are used extensively in England for the preparation of marmalade. The 10,000 boxes of bitter oranges shipped from Jamaica to Canada were at the instruction of the Ministry of Food for the production of marmalade in Canada. Since the British Ministry purchased the orange crop, the Jamaican Food Controller and Competent Authority was able to set a minimum price for fruit purchased by packers from growers. The British Ministry accepted only 3,649 boxes of grapefruit, all of which were of the Marsh seedless variety. Some Marsh were also shipped to Canada and Bermuda. No exports of seeded varieties were made during the season. Exports of orange and grapefruit juice moved largely to the United Kingdom and Canada.

JAMAICA: Exports and estimated production of oranges and grapefruit

Kind	Averages 1925-26 to 1929-30	Averages 1930-31 to 1934-35	Averages 1935-36 to 1939-40	1937-38	1938-39	1939-40	1940-41 a/
Oranges:	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes	1,000 boxes
Exports	94	65	273	239	349	285	171
Production b/	130	164	435	400	500	475	425
Grapefruit:	1926-27 to 1930-31	1931-32 to 1935-36	1936-37 to 1940-41	1937-38	1938-39	1939-40	1940-41 a/
Exports	89	122	121	128	137	137	21
Production b/	140	170	169	180	190	185	180

Compiled from official and consular sources. Exports on September-August year. Oranges in boxes of 200 and grapefruit in boxes of 100.
a/ Preliminary; exports for 10 months only.
b/ Rough estimate based partly on exports.

Reports indicate that the 1941-42 crop, which matures from August to April, will be about normal or somewhat heavier than the below-normal crop of the past season. The plans of the Food Ministry as to the new crop have not been announced, but growers are hoping that the entire orange crop will again be purchased. A new development for the 1941-42 season is the alteration of the duty-free period on American orange exports to Canada. Canada formerly permitted the duty-free import of American oranges for the December-April period, but it has been announced, that, effective April 1, 1941, the period would be altered to January-July, as provided in the Trade Agreement with Canada. (See Foreign Crops and Markets, April 14, 1941, p. 514.) This will give Jamaican oranges, which do not pay an import duty, preferential treatment in Canadian markets for the month of December in 1941.

SWEDEN FACED WITH SHORTAGE OF FRESH FRUIT IMPORTS . . .

Supplies of imported fruit in Sweden have been seriously curtailed by the war, and arrivals during the past year have come largely from Italy, according to information received by the Office of Foreign Agricultural Relations. Previously, Sweden was a leading importing country and imports supplied nearly 40 percent of total fruit consumption. Supplies of domestic fruit in 1941 may be about average. An early May report indicated that blossoming was satisfactory and that a good crop was to be expected provided no later frost damage materialized. A normal 1941 crop will offset to some extent the reduced volume of imports.

From the table below, it will be noted that Sweden drew supplies largely from non-European fruit-producing areas. Among these, the United States, Argentina, South Africa, Palestine, Australia, and Chile ranked high. Imports from this group of countries are the ones seriously affected by the war.

SWEDEN: Imports of specified fresh fruits, calendar year, 1939

Country	Oranges	Grapefruit	Lemons	Apples	Pears	Grapes
	1,000 boxes	1,000 boxes	1,000 boxes	1,000 bushels	1,000 bushels	Short tons
United States	186	7	1	355	123	7,520
Italy	506	2	70	23	30	1,281
Palestine	473	43	1	-	-	-
Spain	82	-	1	-	-	9,279
Brazil	69	1	a/	-	-	-
South Africa	65	3	-	11	53	3,717
Australia	-	-	-	285	25	345
Argentina	-	a/	-	59	172	11,842
New Zealand	-	-	-	20	14	-
Chile	-	-	-	4	3	821
Other countries ..	10	0	1	5	3	11,344
Total	1,391	56	74	762	423	46,149

Compiled from official sources. Oranges in boxes of 70 pounds, grapefruit 80 pounds, lemons 76 pounds, apples in bushels of 48 pounds, and pears in bushels of 50 pounds. a/ Less than 500 boxes.

Except for a small volume of apples imported from Denmark at the beginning of 1941, all the imported fresh fruit has originated in Italy; and, although no statistics are available, imports from Italy are reported to have expanded considerably. The principal fruits being received from Italy are oranges, lemons, apples, pears, peaches, plums, cherries, grapes, and, on a small scale, grapefruit. Business with Italian exporters is now done entirely on a firm basis, with no consignment shipments forthcoming. Previously, a large proportion of imports was shipped on a consignment basis. A small volume of grapes and oranges received in the fall of 1940 was the last arrival from Spain into Sweden. Sweden has been unable to do business with Spain because of the many obstacles arising out of the war, including transportation and clearing difficulties and high freight costs. In fact, the imports of last fall were shipped from Spain by boat to Genoa, Italy, and overland by rail from that port to Sweden. The Netherlands formerly was a supplier of domestic fruit and also shipped imported fruit to Sweden, but no imports from that country have arrived in Sweden since the fall of 1940. Trade reports indicate that the exportable surplus of Netherland fruits is moving into Germany.

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LIVESTOCK AND ANIMAL PRODUCTS

CANADIAN HOG NUMBERS EXPECTED TO SHOW INCREASE IN 1941 . . .

Present prospects indicate a still further increase in hog numbers in Canada, according to Agricultural Attaché C. C. Taylor. The Canadian Government is encouraging hog producers to continue the present expansion so as to be able to provide 600 million pounds of bacon for export in the coming year, November 1 to October 31. At present the relationship between hog and feed prices is favorable to an increase in hog numbers, as hog prices, following the successive increase in prices paid by the Canadian Bacon Board for export bacon, have risen faster than feed prices. The price of Grade B-1 bacon hogs at Winnipeg rose from $7.76 ($7.05 American) per 100 pounds live weight on April 17 to $10.50 ($9.55) by July 17. Hog prices are about 22.5 times the current price of feed barley, according to the report (about 25 times the price at which barley futures are currently quoted). Then, too, feed supplies were to be increased by the 25-to-30-percent increase in this year's barley acreage even though yields may not be so high as last year.

The number of hogs in Canada probably reached 6,250,000 by June 1941, according to an estimate of the American agricultural attaché stationed at Ottawa. This would be an increase of 6 percent compared with the number on hand in June 1940 and 15 percent above the preceding June estimate. Official estimates for June 1941 are not yet available.

The reduction in hog marketings has been unusually heavy in recent weeks, which has cut down supplies of bacon for export. During the 13 weeks ended July 24, the number of hogs graded was only 15 percent above a year earlier, whereas in the 16 weeks preceding, marketings were nearly 30 percent higher than a year earlier. Larger than usual domestic consumption in the first part of the year and the increase in exports of live hogs to the United States are believed to be partly responsible for the abnormally heavy seasonal reduction. It is also possible that producers have delayed marketings somewhat in view of a rapid rise in price in the United States and successive price increases granted by the Canadian Government. Domestic consumption has now been restricted by the Government and exports to the United States banned. Before the export ban was announced the United States afforded an alternative market for heavier hogs, which are not penalized to such extent in the United States as in Canada. In view of these steps recently taken by the Canadian Government, a larger than usual seasonal increase in marketings may be expected this fall and the critical shortage in export supplies of bacon ended within a few weeks.

Pork consumption in Canada in 1941 under existing conditions, may be expected to be between 600 and 625 million pounds instead of 700 million pounds as originally estimated for this year and as compared with 588 million pounds consumed in 1939.

Canadian exports of bacon in the last half of 1941 may amount to 275 million pounds, according to present indications, based on probable slaughter and domestic consumption during the last half of the year. Exports of bacon and pork to all destinations in the first 6 months of 1941 amounted to 260 million pounds compared with 167 million pounds a year earlier and only 87 million pounds in the same period of 1939. Imports were small, amounting to only 2.5 million pounds against 31 million pounds a year ago (principally from the United States). The relationship of hog prices in the United States and Canada at present is not such as to attract imports of pork from the United States as was the case in the early months of 1940. The Canadian import restriction of 1,627,000 monthly was extended to March 31, 1941, and then expired.

DANISH LIVESTOCK MATERIALLY REDUCED SINCE JUNE 1940 . . .

The effects of the cutting off of imports of foreign feedstuffs from Denmark as a result of the blockade is well illustrated by the reduction in livestock numbers since June 1940. April figures, however, showed a slight increase above the low point reached in March, except in the case of hogs.

DENMARK: Number of livestock and poultry as of April 19, 1941, with comparisons

Classification	July 15, 1939	Dec. 30 1939	June 29, 1940	Nov. 2, 1940	Mar. 8, 1941	Apr. 19, 1941
	thousand	thousand	thousand	thousand	thousand	thousand
Cattle, total	3,271	3,186	3,226	2,976	2,976	3,068
Milk cows and heifers	1,614	1,618	1,591	1,511	1,483	1,506
Heifers that have not calved	659	582	635	563	565	644
Hogs	3,133	3,134	3,218	2,528	1,873	1,825
Horses	577	--	575	--	--	540
Poultry, total	26,126	--	21,865	11,260	8,055	8,352
Cocks, 6 months and over	150	--	127	233	171	160
Hens, 6 months and over	12,075	--	12,065	9,866	7,884	7,845
Chickens, under 6 months	16,901	--	9,673	1,161	--	347

Compiled from official sources.

The main decreases between June 1940 and April 1941 were in hogs and poultry. Hogs were reduced 14 percent to 1,825,000 head and still further as of May 30 to 1,721,000. The total number of poultry as of April 19, 1941, was reduced to 8,352,000 and was 62 percent smaller than in June 1940. The number of laying hens of 6 months and over were smaller by more than 4,000,000 than in June 1940. Although there was a decrease of 158,000 in total cattle numbers from June to April, milk cow numbers decreased only

slightly. The decline in horses was not large. The comparison between June and April is not an exact comparison, but April estimates are not available for earlier years.

An exact comparison can be made of changes in hog numbers as May estimates are available for a series of years. The number of hogs as of May 30, 1941, was 45 percent smaller than a year earlier and 42 percent below the average number on that date for the 5 years 1936 to 1940. The total number of bred sows, estimated at 161,000 on May 30, 1941, showed a decrease of 28 percent compared with the May 1940 estimate. The reduction was wholly in older bred sows, however, as young bred sows, estimated at 74,000, showed an increase of 4 percent compared with a year earlier, but were 33 percent smaller than in May 1939.

Potential hogs for slaughter, including all not reserved for breeding purposes, of weights from under 77 pounds to over 132 pounds, numbered 1,086,000 on May 30, only 27 percent of which were designated as fat hogs ready for slaughter. This compared with a total of 1,944,000 in May 1940, 32 percent of which were fat hogs for immediate slaughter. Young hogs under 77 pounds begin raised for marketing as of May 30 numbered 432,000 and were 37 percent fewer than a year earlier, whereas hogs of 77 to 132 pounds numbered 366,000 and were 42 percent under a year earlier.

DENMARK: Hog numbers on May 30, 1941 with comparisons

Classification	May 8, 1937	May 7, 1938	May 6, 1939	May 4, 1940	May 30, 1941
	Thousands	Thousands	Thousands	Thousands	Thousands
Boars:	21	17	18	17	11
Sows:					
Young bred sows	74	93	111	71	74
Older " "	159	132	160	151	87
Total bred sows ..	233	225	271	222	161
Sows with litters ..	89	81	81	101	47
Barren	26	21	20	26	18
Condemned	11	9	9	17	8
Total sows	359	336	381	366	234
Suckling pigs:	761	687	684	807	390
Slaughter hogs: a/					
Under 77 pounds	752	677	657	690	432
77 to 132 pounds ...	625	499	571	628	366
132 pounds and over.	519	451	443	626	288
Total for slaughter	1,896	1,627	1,671	1,944	1,086
Total hogs	3,037	2,667	2,754	3,134	1,721

Official sources. a/ Potential or already of slaughter weight.

Indications are that hog slaughter this summer showed a further decline. Hog slaughter in export houses in the first 4 months of 1941 amounted to only 866,000 head and was 30 percent smaller than in the same

period of 1940 and 35 percent below 1939. There has been an important increase in exports of live hogs, principally to Germany, during this period, shipments amounting to 124,000 head in the first 4 months of 1941, against 61,000 a year earlier and 43,000 in the same period of 1939. At the same time, the export of bacon has decreased during the 4-month period from 127 million pounds in 1939 to 120 million in 1940 and still further to 78 million in 1941.

DENMARK: Hog slaughter and exports of live hogs and bacon, January-April, 1939-1941

Month	Hog slaughter in exporting houses			Live hogs exported			Bacon exported		
	1939	1940	1941	1939	1940	1941	1939	1940	1941
	Thousands	Thousands	Thousands	Thousands	Thousands	Thousands	Million pounds	Million pounds	Million pounds
Jan. ..	356	330	241	2	11	37	30	34	23
Feb. ..	304	255	197	12	12	30	29	14	15
Mar. ..	361	405	198	15	13	34	32	46	21
Apr. ..	302	250	a/ 230	14	25	23	36	26	19
Total	1,323	1,240	866	43	61	124	127	120	78

Compiled from official sources. a/ Preliminary.

AUSTRALIA INVESTIGATES ADVANTAGES OF ZEBU (BRAHMAN) CROSS CATTLE . . .

Recent reports from North Australia indicate that cattlemen of that territory are crossing Zebu (Brahman) cattle with the more beefy but less hardy English breeds. These reports indicate that the experimentors are obtaining very satisfying results in their endeavor to overcome obstacles arising from adverse climatic conditions, which tend to retard the progress of the cattle industry of North Australia.

Cattle raising in North Australia has been an increasingly difficult problem since the introduction of the cattle tick in 1872. The tropical conditions in costal areas and the high average temperatures, sparse and unreliable rainfall, poverty of soil, inadequate water supply in the inland areas, and diseases and parasites have made existence very difficult for cattle of the English breeds accustomed to more moderate conditions. Due to these adverse conditions, those breeds could not be expected to maintain the standards of type, conformation, virility and fecundity for which they are noted in lands possessing more favorable growing conditions. Consequently a search was begun to locate some breed or combination of breeds that might exist and produce beef under the adverse conditions of North Australia. Of encouragement to the North Australian cattlemen were the results obtained with experiments in the Gulf region of the United States. Here American cattlemen introduced Zebu stock from India, where this hardy breed originated, and have crossed them on animals of the Hereford,

Shorthorn, and Aberdeen Angus breeds with very satisfying results. It was observed that animals containing three-eights or more Zebu blood were resistant to ticks in a varying degree. This resistance has been attributed to their toughness of skin, shortness of hair, which allows few places for ticks to harbor, and to the waxy secretion from the hide.

In 1932 the Council for Scientific and Industrial Research issued a report dealing with the possible advantages of Zebu cross cattle in North Australia. In 1933 a representative was sent to America to select a number of Zebu male and female cattle sufficient to make experimentation possible. Subsequently, a few purebred Zebu cattle were imported and a series of observations undertaken. The original United States Zebu cattle used in the North Australian experiments have now expanded to five experimental herds containing 5,109 cattle descended from the original 19, and represent crosses with the Shorthorn, Hereford, Red Polled, Black Polled, and Jersey breeds, as well as a small herd of Zebu purebreds. The most satisfactory cross seems to have been males of the English breeds on females of the Zebu breed. Observed characteristcs of the hybrids are resemblance to the original breeds according to percentage of blood, marked decrease of the Zebu hump, shortness of the hybrid coat, looseness of skin, and the lyrate shape of horns.

A number of factors contribute to the advantages of the hybrids over the original breeds as regards this particular locality in Australia. In this combination the hybrid represents an individual thicker and more beefy than the original Zebu and more resistant and hardy than the original English breeds. The hybrids are better fed rustlers than the English breeds, the females stay in better condition before and after calving, the calves are in better condition at weaning time, and the deterioration of fat hybrid bullocks when held over into the dry winter season is not so great. Also the mortality rate of the hybrids is 30 percent less than the English breeds, and while the carcasses do not come up to the standards set by the English breeds, the half-and quarter-bred Zebus yield carcasses that comply with the requirements of the Australian export-beef trade.

Beyond the regions now being tried, no satisfactory observations have been made under the provisions of the investigation as to the possibility of further development of areas not well suited to the English breeds through the use of the Zebu hybrids. It is emphasized that no recommendation is made that Zebu stock should replace the English breeds in areas with a mean annual temperature of less than 68 degrees F. and an average maximum temperature for the coldest month of less than 66 degrees F. Results of experiments and actual trials in the United States, North Australia, and other regions do suggest, however, that in less favorable areas the hybrids might be used with advantage because of their hardiness, resistance, and thriftiness.

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GENERAL AND MISCELLANEOUS

THE RUSSO-GERMAN WAR AND THE AGRICULTURAL SITUATION IN THE SOVIET UNION . . .

The effects of Nazi invasion on the Soviet agricultural economy are still largely obscure after 7 weeks of warfare. It is even difficult under the conditions of the present war, with its "fluid" front and with contradictory claims of belligerents, to judge accurately the extent of German penetration. Reported advance movements of German mechanized spearheads do not necessarily imply an effective occupation of the hinterland, although even in such areas farm operations could hardly proceed normally.

From an agricultural standpoint there is a marked distinction between the sections occupied or threatened by the Nazi invasion in the center and north of the Soviet Union on the one hand, and in the south and west on the other hand. The former regions, which are occupied in whole or in part by the Nazis - White Russia (Belorussia), Smolensk, Kalinin (formerly Tver), and the southern part of Leningrad Provinces, and sections farther north bordering on Finland - are in what is known as the "consuming" or grain-deficit zone. They are characterized by poor soils, produce mostly winter rye among food grains (although wheat growing has been on the increase), and depend on shipments from the south and east for a considerable part of their grain supply. This is also true of the, as yet, uninvaded neighboring provinces to the east and north, such as Moscow, Ivanovsk, and Yaroslav (all industrial regions), as well as the areas farther north. An important technical crop in this section of the country is flax fiber. Smolensk and White Russia together account for about one-fourth of the total Soviet flax-fiber acreage.

In the south and west, the Nazis and their allies have apparently succeeded in penetrating or occupying Bessarabia and other Rumanian, Polish, and most of the Baltic territories recently annexed by the Soviet Union, as well as the western tier of Provinces of Russian Ukraine - Kamenetz-Podolsk, Vinnitsa, Zhitomir, and a considerable part of the Kiev Province. A drive in the direction of southern Ukraine (the Provinces of Odessa and Nikolaev) is now reported. Situated in the fertile black-soil belt, western Ukraine is the principal sugar-beet-growing region of the Soviet Union, comprising nearly 40 percent of the total Soviet sugar-beet acreage. A considerable number of sugar mills are located in this area. In addition, it is also an important winter-wheat-growing region characterized by high per-acre yields of the grain and accounting for about one-fifth of the Ukrainian wheat acreage. Wheat and other small grains are usually harvested during the latter part of July and early in August, and sugar beets in the early autumn. How much of the grain crop was saved by the Russians or destroyed, it is impossible to say.

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The grain crops in southern Ukraine and Crimea should be largely harvested by the middle of August. How far it would be possible to save the crop in this area, should the move of the Nazi war machine southward succeed, would largely depend upon the ability of the heavily overburdened Russian railroads to move the grain.

According to Soviet reports, harvesting is now under way in the southern and central regions, and an effort is being made to speed it up. The outturn of all crops is said to be good and in some areas excellent. Grain deliveries to the Government are progressing normally, according to the Soviet press. Not only the size of the crop, but the transportation problem, too, will play a decisive role in the Russian food situation, as the shipping difficulties experienced during the last war demonstrated.

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FOREIGN EXCHANGE . . .

EXCHANGE RATES: Average value in New York of specified currencies, August 9, 1941, with comparisons a/

Country	Monetary unit	Year 1940	Month				Week ended		
			1939	1940	1941			1941	
			July	July	June	July	July 26	August 2	August 9
		Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
Argentina ..	Paper peso	29.77	31.21	29.77	29.77	29.77	29.77	29.77	29.77
Australia b/	Pound	305.16	373.03	303.11	321.25	321.31	321.54	321.33	321.34
Canada b/ ...	Dollar ...	85.14	99.83	86.92	88.18	88.27	88.31	88.49	88.85
China	Shang.yuan	6.00	10.64	6.05	5.34	5.24	c/5.28	e/	e/
England b/ ..	Pound	383.00	468.15	380.47	403.16	403.23	403.51	403.25	403.27
Germany	Reichsmark	40.02	40.11	39.98	d/39.97	e/	e/	e/	e/
Italy	Lira	5.04	5.26	5.03	d/5.26	e/	e/	e/	e/
Japan	Yen	23.44	27.28	23.43	23.44	23.44	23.44	e/	e/
Mexico	Peso	18.55	17.13	19.91	20.53	20.54	20.54	20.54	20.54
Sweden	Krona	23.80	24.11	23.84	d/23.84	23.84	e/	e/	e/
Switzerland..	Franc	22.68	22.55	22.68	d/23.21	e/	e/	e/	e/

Federal Reserve Board.

a/ Noon buying rates for cable transfers. Denmark, France, the Netherlands, and Norway omitted, as rates are not available. The last average monthly quotations in 1940 were as follows: Denmark, March 19.31 cents; France, June, 2.01; the Netherlands, April, 53.08; and Norway, April, 22.71 cents

b/ In addition to the free rate there is also a fixed official buying rate: Australia, 322.80 cents; Canada, 90.91; and England, 403.50 cents.

c/ Average for 5 days, rate for July 26 not available. d/ Through June 16 only.

e/ Not available.

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